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ABSTRACT

The U.S. Office of Personnel Management (OPM) evaluated the feasibility of individual learning accounts (ILAs) as an approach to workforce development. Thirteen federal agencies volunteered to participate in the initiative. Together, they conducted a total of 17 pilot tests. Some pilot tests included all employees in the agency. Others targeted employees by specific occupations, grade levels, skill needs, and organization components. According to anecdotal feedback, employees and management considered ILAs a desirable approach to training and development. The pilot test demonstrated that ILAs are a feasible and practical approach to workforce development for the following reasons: (1) they are readily adaptable to the development needs of all employee grade and skill levels; (2) they can be targeted to meet specific competency gaps and workforce development needs; (3) they effectively use official time, employee time, dollars, or combinations thereof; and (4) they foster shared responsibility between organization and employee. It was recommended that ILAs be implemented governmentwide and supported through consultation and networking. (Appendixes constituting approximately two-thirds of this document contain the following items: OPM Federal ILA pilot initiative guidelines; a list of federal ILA pilot initiative coordinators; synopses of agencies' federal ILA pilots; and synopses of agencies' federal ILA pilots results.) (MN)

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Report to the OPM Director
Individual Learning Account Pilot Initiative:

A Learning Tool for the 21st Century

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Office of Human Resource Development
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March 30, 2001

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As workers take more control over their own career destiny, training and development are becoming more important in recruiting and retention...

... workers in all occupations want to maintain their skills, knowledge, and capacity to make their own career choices. Employers eager to attract and hold top talent will use workforce learning opportunities more strategically to build a stable workforce of high-capability employees.

American Society for Training and Development (ASTD)
Trends Watch:
The Forces That Shape Workplace
Performance And Improvement

Executive Summary

Today, it is widely recognized that the rapid growth of technology, increased complexity of the work environment, and competition for qualified people has greatly impacted how organizations approach recruitment and retention of staff. The Federal Government is placing greater emphasis on training and development tools as investments to ensure their workforce is adequately prepared to meet the challenges of the 21st Century. Individual Learning Accounts (ILAs) are a 21st Century learning tool that provide a flexible and innovative approach to developing today's workforce and building a new generation of workers.

ILAs were piloted in the Federal Government to determine their potential and value as a workforce development tool for Federal employees. Agencies participating in the ILA pilot generally felt that ILAs can add value and have excellent potential for use in the Federal Government as typified by the following comment.

> *"ILAs are an important recruitment and retention tool that the Federal Government needs in order to compete with private industry. More importantly, it is a powerful tool for developing a workforce that is intellectually more flexible and capable of adapting to meet and keep up with the changing work environment."*

Introduction

The Federal Training Technology Task Force was established January 12, 1999 by Executive Order 13111, *"Using Technology to Improve Training Opportunities for Federal Government Employees."* The Task Force was charged with developing a policy to "make effective use of technology to improve training opportunities for Federal Government employees." One of the specific tasks in the Executive Order to be addressed by the Task Force was to:

> *"Develop options and recommendations for establishing a Federal Individual Training Account for each Federal worker for training relevant to his or her Federal employment. To the extent permitted by law, such accounts may be established with the funds allocated to the agency for employee training. Approval for training would be within the discretion of the individual employee's manager."*

A Task Force Subgroup explored options for the establishment of Individual Training Accounts (ITAs). Although ITAs appeared to hold great promise for developing the workforce, the Subgroup decided that there needed to be more empirical data to determine the scope and practicality of using ITAs in the Federal Government. They recommended that the goals of the proposed Individual Training Account initiative should be broadened to support not only training opportunities but continuous learning development. Therefore, the Subgroup renamed Individual Training Accounts as Individual Learning Accounts (ILAs) and defined them as:

> ***A base amount of resources expressed in terms of dollars or hours or both that are set aside for an individual employee to use for his or her learning and development.***

In addition, the Subgroup recommended that ILAs be piloted in agencies to determine the effectiveness of ILAs in the Government.

OPM launched the ILA Pilot initiative in December 1999. Agencies were invited to participate in the pilot and OPM provided guidance to assist in implementation. Thirteen agencies accepted the invitation and volunteered for 17 pilots (some agencies chose to pilot multiple ILA plans). The pilots ranged from including all employees in the agency to targeting employees by specific occupations, grade levels, skill needs, and organization components. The ILA pilot resources included dollars, official time, employee time, or a combination of both.

Individual Learning Account Pilot Initiative Findings and Recommendations

Findings:

Agencies are enthusiastic about this new development tool. Anecdotal feedback from employees and management indicate that ILAs provide a different and advantageous approach to training and development.

> *"... people in our branch are doing some wonderful stuff with their ILA money and then sharing it and handouts weekly in our team meetings. We are all learning a lot. We've had several presentations/discussions on financial management; web page design/development; communication courses; various conferences people attended... All of it is lots of fun and adds so much life to work!!"*

> *"The results of our pilot effort lead us to recommend that an ILA-type program should not only continue, but be made available to a greater audience as well."*

"The pilot program raised awareness among employees about the different continuous learning activities available to them. It demonstrated to employees the agency's commitment to continuous learning. Also, it enabled our agency's ILA pilot component to focus on their employees."

The pilot demonstrated that ILAs are a feasible and practical approach to the 21st Century workforce needs of the Federal Government because they:

- are readily adaptable to the development needs of all employee grade and skill levels;
- can be targeted to meet specific competency gaps and workforce development needs;
- effectively use official time, employee time, dollars or combinations of the three as a resource; and
- foster shared accountability between the organization and the employee.

The agencies overwhelmingly recommended the implementation of ILAs and continued OPM guidance and leadership in this effort. OPM endorses these recommendations.

Specifically the Recommendations are:

- Implement ILAs Governmentwide;
- Develop guidance for implementation of ILAs, in collaboration with ILA pilot agencies; and
- Promote the use of ILAs and support the effort with consultation and networking.

The following report presents information on the results of the ILA Pilot Initiative.

Report of the Individual Learning Account Pilot Initiative

REPORT OF INDIVIDUAL LEARNING ACCOUNT PILOT

Background

The Federal Training Technology Task Force, in its charge to explore how Federal training programs, initiatives, and policies could better support continuous learning through the use of technology, created a subgroup to explore options for the establishment of Individual Training Accounts (ITAs). The Subgroup found from their research that ITAs might be a positive addition to an agency's toolkit of approaches for addressing the training needs of its workforce. However, the Subgroup concluded that there was a need for more empirical data to determine the scope and practicality of using ITAs in the Federal Government. The Subgroup recommended that ITAs be renamed and redefined as Individual Learning Accounts (ILAs), and be piloted in the Federal Government to determine their feasibility and practicality for use Governmentwide.

Piloting Individual Learning Accounts (ILAs) in the Government

The Task Force Subgroup recognized the likely potential of ILAs in improving the development opportunities of Federal employees. The Subgroup found that the use of ITAs was an emerging workforce development tool in the private sector. They reviewed examples of existing ITA models in the Pennsylvania State government and foreign governments such as the United Kingdom. Federal ITA-like programs were also investigated. Yet, the limited data available about ILAs was not sufficient to conclusively assess the value added by this approach. Consequently, the Task Force recommended that ILAs be piloted in the Government.

Following the approval of the Task Force recommendation, the U.S. Office of Personnel Management (OPM) invited agencies, including field and regional offices, to participate in the ILA pilot Initiative. The OPM invitation and ILA guidance (Appendix A) asked agencies to develop ILA plans, participate in piloting ILAs and assist the Task Force in evaluating the effectiveness of ILAs for Federal workers. Agencies, within the parameters provided in the guidance, were encouraged to structure their pilots to use innovative models that best met their organizational needs. In developing pilot plans, agencies were requested to use the following definition of ILAs:

> ***A base amount of resources expressed in terms of dollars or hours or both that are set aside for an individual employee to use for his or her learning and development.***

ILA training opportunities were not limited to programs delivered by learning technology and could be used to develop knowledge, skills, and abilities that directly relate to the employee's official duties. In addition, the guidance explained the ILA pilot initiative as a strategy or tool that complemented current agency training activities. Sample objectives for agency ILA pilots included, but were not limited to:

- improving organizational performance and meeting specific agency strategic performance goals;
- supporting employee efforts to acquire skills and learning needed to succeed in specific occupations and professions;
- providing employees with flexible learning opportunities, and putting the responsibility for learning in the hands of the learner;
- improving Federal employee performance, increasing productivity, and improving customer service skills;
- supporting employee continuous learning;

As agencies identified possible pilots, they considered issues such as equity and union involvement in pilot development and implementation. For their final report to OPM, agencies also considered how to track the pilot results and any issues associated with the administration and funding of the pilots.

With the exception of Schedule C appointees and uniformed personnel in the U.S. Department of Defense, agencies were allowed to establish ILA pilots that included any executive branch Federal employee, including career, career conditional, part time, temporary, or excepted service employee in professional, technical, clerical, administrative, or management positions.

In response to OPM's invitation, thirteen agencies volunteered to participate in the ILA Pilot Initiative. However, one agency withdrew due to resource shortages that prevented the implementation of their ILA pilot. Additionally, another agency was not able to pilot one of its multiple ILAs. The remaining twelve agencies piloted fifteen ILA plans. The agencies were:

Department of Commerce (DOC)
Department of Defense (DOD)
Department of Health and Human Services (HHS)
Department of Housing and Urban Development (HUD)
Department of Labor (DOL)
Department of Transportation (DOT)

Department of Treasury (Treasury)
Environmental Protection Agency (EPA)
General Services Administration (GSA)
Occupational Safety and Health Review Commission (OSHRC)
Office of Personnel Management (OPM)
Social Security Administration (SSA)

A listing of agency ILA coordinators is contained in Appendix B.

Agency Individual Learning Account pilot plans were received at OPM in January 2000. OPM reviewed the plans for adherence to the issued guidance and provided assistance to agencies requesting additional direction and feedback on their plans. Most pilots began in March 2000 and agencies began submitting initial pilot evaluations in September 2000.

The ILA pilot projects in these agencies ranged from covering all employees in the agency to targeting employees by specific occupations, grade levels, skill needs, and organization components. More than twenty-five thousand employees were covered by the ILA Pilot Initiative and approximately six thousand employees were actually participating in the pilots at the time of the evaluation reports. The ILA pilot resources included dollars, official time, or a combination of both. Descriptions of the pilots are contained in Appendix C.

OPM established an interagency group of ILA coordinators and worked with them through meetings and electronically throughout the pilot period. Agency issues raised during this phase were labor involvement, funding, management support for the project, ability and feasibility to assess and measure performance results of ILAs within the time frame of the project.

It is significant to note that although the pilot initiative has concluded, several agencies continue their ILA projects and have incorporated them into their planning and budgeting for fiscal year 2002.

Are Individual Learning Accounts A Practicable Means of Improving Training Opportunities For Federal Employees?

Yes, the consensus of the pilot agencies is that the ILA pilots were a superior initiative and should be continued. They agreed ILAs expanded the flexibilities currently available for employee training and development. Agencies suggested that they could maximize the use of ILAs to address specific solutions to their human capital development issues through improving training opportunities.

Agencies confirmed that Individual Learning Accounts are a viable means of improving training opportunities for Federal employees as evidenced by the ILA pilots anecdotal and survey feedback.

> *"Employee reaction has been very positive. A significant number of employees applied to continue with the program this year. Over sixty percent of those who applied have been accepted. The majority of them have clearly defined career goals within the organization and they feel this program will help them reach those goals."*
>
> *"Thank you so much for helping me get back into school."*
>
> *"You all are really doing a good job with this! Really like taking courses on-line because you can take them at your own pace."*
>
> *"The online university is great because it assists my employees with continuing development and encourages educational growth. The cost savings is even better!"*

The increased flexibility and focused employee involvement and development realized through use of ILAs are apparent from the variety and creativity of pilot designs. The twelve agency ILA pilots included employees from the Senior Executive Service to GS-4 and wage grade. The diversity of the employee groups covered by the different ILA plans illustrated the many approaches that can be used by agencies to ensure equitable treatment of employees.

ILA resources ranged from more than $2 million in one agency to no funding in several others. Agencies creatively used combinations of funding, if available, and official and employee time. The ILA plans included innovative approaches to selecting training opportunities made available through the ILAs, as well as setting varied parameters for participants to build their own ILA Plan of Action.

The pilots also reveal that significantly effective learning opportunities can be provided without additional funding or with no funding. The following example illustrates how one pilot used time as an ILA resource.

> *The participants were granted an account of twenty official duty hours to pursue training and development activities. The goal of this ILA was to encourage and empower employees to take advantage of various learning opportunities. The job-related, no additional cost learning activities included:*
>
> - *On-line, web based technology and essential skills courses;*
> - *Self-study courses covering human resource practices and procedures;*
> - *Use of educational programs on audio and video cassette;*
> - *Professional counseling; and*

- *College advisory services-counseling for employees who want to start or continue their college education.*

The above example demonstrates the versatility of ILAs regardless of funding.

ILAs made training more visible in the pilot organizations and helped to highlight the connection between training, workforce development and strategic planning as illustrated by the following:

One agency's ILA pilot implementation incorporated employee assessment; targeted training opportunities for skill gaps identified; and provided on-line training and first level assessment as part of the ILA participant's experience. The self-assessment component was based on seventeen core competencies determined by the agency to be necessary skills for their workforce. The seventeen core competencies are directly related to leadership competencies, thereby preparing employees for a seamless transition from non-supervisory to leadership responsibilities.

Another agency targeted employees whose organizational component planned to modernize their systems thereby requiring employees to upgrade their skills. Participating employees were enthusiastic about their opportunity for involvement in the training process and the varied training options available to them. Eighty five percent of the eligible staff completed a Plan of Action to use their ILA tying the employee learning options to the established pilot and organizational goals. Sixty three percent completed one or more training courses during the time period of the pilot with over half of the respondents indicating that the courses they attended were very valuable to the effectiveness of their work.

The results of the ILA pilot initiative show that ILAs are a feasible and viable tool to broaden and enhance the training opportunities for Federal employees. When using ILAs, employees are more involved, responsible and accountable for their development. Because ILAs foster management and staff involvement in continuous learning decisions, they are more likely to result in skill development that is integrated with organizational goals. (Pilot results are excerpted in Appendix D.)

Lessons Learned in the Individual Learning Account Pilot Initiative

Although there were different ILA plans, goals and objectives established by the agencies, several common implementation Lessons Learned emerged. Consideration of these Lessons Learned is critical in developing strategies for successfully implementing ILAs.

Need for ILAs to be related to the agency's strategic goals. Agencies indicated that this would raise agency awareness for investment in training and highlight how ILAs impact workforce development. Some agencies' pilots required employees to develop a plan in order to participate. These employee ILA plans fostered a more focused approach on the part of ILA participants and greater commitment to what they wanted to accomplish. Also, management had a better understanding of the connection between the training activities the employees were pursuing and the established employee objectives as they related to the organization's strategic objectives.

Need to plan strategies and mechanisms to measure improved organizational performance and increased productivity. Agencies noted early in the pilot that measuring performance results may require more time than this pilot project covered. However, all agreed that performance measurement mechanisms need to be part of the ILA plan and timed to capture the information necessary. Some agencies provided anecdotal performance results in their initial evaluation reports. OPM will continue to work with these agencies as they continue to use ILAs and collect performance measurement information.

Need for a good marketing strategy. Early and aggressive marketing of ILAs within an agency is a necessity. The agencies that incorporated marketing as a significant part of their approach, found management, as well as employees, responded more positively. One agency held a kick-off meeting with speakers from management presenting the ILA pilot and physically distributing representative "ILA dollars". This agency's pilot also provided counselors to assist employees in developing their ILA plans. When marketing was not done, participant feedback indicated there was insufficient training information, not enough advance notice, and a need for more awareness of training resources.

Need for ILAs resources to be defined, understood, and available before starting. When beginning to use a new tool such as ILAs, agencies suggested that it is important to provide an advisor for the participants and make the ILA resource available to the participants up front. Some agencies were still unsure of the extent of their ILA resources as they began the ILA pilot implementation process. When the resources were defined early, agencies committed to what they would provide and employees understood the availability and requirements for use of the ILAs. There was general consensus that ILAs using dollars would fare better with central funding within the agency and access to resources that could grow to run the program as the implementation of ILAs grew in the agency.

Need for culture change to implement ILAs. The agencies emphasized that implementing innovative tools like ILAs reflected a culture change for many organizations. It should be understood that this is a shift from emphasis on management directed training to joint collaboration. Inherent in this shift is shared

accountability between management and employees for workforce development. Several agencies encountered supervisor resistance to joint determination of what is necessary for workforce development. Some agencies addressed this issue by focusing on educating first line supervisors. Ultimately, many agencies may need to adjust how they approach learning and development in order to embrace and fully benefit from the value of ILAs.

Recommendations

The agencies overwhelmingly recommended the implementation of ILAs and continued OPM guidance and leadership in this effort.

The following recommendations are an integrated approach to help reinvigorate Federal training and development and ensure the workforce is prepared to meet present and future organizational demands.

OPM endorses these recommendations.

Recommendation 1: Implement ILAs Governmentwide.

Individual Learning Accounts are a significant addition to the human resource development toolkit of support available to employees and management for workforce development and human capital management. ILAs give agencies more flexibility, give training and learning more visibility, and can be used as a valuable marketing tool for continuous learning and improved organizational performance.

Governmentwide benefits of ILAs implementation:

- strengthen links between corporate strategic direction, core competencies, and training requirements; and
- build a bridge for communication between employees and management to ensure individual development and learning are in line with the goals of the organization.

Recommendation 2: **Develop Guidance for Implementation of ILAs, in Collaboration with ILA Pilot Agencies**

Agency ILA evaluation reports indicated that flexible and effective guidance is important in successfully implementing ILAs across Government. This guidance should incorporate Lessons Learned from the ILA pilots.

Recommendation 3: **Promote the Use of ILAs and Support the Effort with Consultation and Networking.**

Management has a crucial role in this initiative. In order to successfully implement ILAs Governmentwide, managers must be educated about the benefits to both employees and the organization. OPM's leadership in supporting agencies in this effort will strengthen the long-term success of ILAs and foster their use throughout Government.

On The Horizon

From the vantage point of a comprehensive review of all the ILA pilots, it is clear that ILAs have great untapped potential. Of particular importance is the fact that two pilot agencies did not use funding as a resource to implement ILAs. These agencies' pilots demonstrated how official time and learning activities requiring no additional funding were used to address specific agency needs. There are also other possible resources not requiring additional funds that were not investigated in this pilot initiative such as employee use of surplus Government personal computer (PC) equipment at home to complete online programs or agency developed programs accessible through remote access or by compact disc (CD).

The recommendations of the participating agencies leave little doubt that ILAs are a viable Federal workforce development tool for the 21st Century. Yet the creativity and versatility of the ILA pilot plans implemented by this group are only a small sample of the flexibility available to agencies Governmentwide. The capability to shape ILA use to the specific needs of each agency provides extensive possibilities as a workforce development and learning tool. We believe if used widely and effectively, a learning account for individuals (ILA) can significantly help in our struggle to attract and retain skilled workers.

Appendices

Appendix A. OPM Federal ILA pilot Initiative Guidelines

INDIVIDUAL LEARNING ACCOUNTS
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INDIVIDUAL LEARNING ACCOUNTS
Guidance for Implementing Pilot Projects

BACKGROUND:

President Clinton's January 12, 1999, Executive Order No. 13111, *"Using Technology to Improve Training Opportunities for Federal Government Employees,"* established the Presidential Task Force on Federal Learning Technology, a task force to explore how Federal training programs, initiatives, and policies can better support lifelong learning through the use of learning technology. The Task Force consists of heads of Federal departments and agencies and their representatives.

The Executive Order requires the Task Force to complete several tasks within specific time frames. These tasks included a requirement to

> *"Develop options and recommendations for establishing a Federal Individual Training Account for each Federal worker for training relevant to his or her Federal employment. To the extent permitted by law, such accounts may be established with the funds allocated to the agency for employee training. Approval for training would be within the discretion of the individual employee's manager. Options and recommendations shall be reported no later than six (6) months from the date of this order."*

To meet this charge, the Task Force created a workgroup, which researched current ILA use in the public, and private sectors, explored issues related to implementing ILAs in the Federal Government, and prepared recommendations that the Task Force forwarded to the President on July 12, 1999.

A. Task Force findings.

The Task Force found that Individual Learning Accounts (ILAs) are a relatively new concept, and there are not many examples of programs with a long track record. The programs reviewed by the Task Force were all in early implementation stages, in the private and public sectors. In these programs, both the employee and the employer, and sometimes the state, contribute money to a bank or company account in the employee's name, which the employee may use for education and training. Before dispersing funds from an account, a bank or a company official makes sure that the money will be used for its intended purpose. Other characteristics of the programs studied included:

- Each establishes a base amount of funding.
- Each is expressed in dollars.

- Each establishes a set aside for the use of a specific individual.
- Each is designed for the purpose of learning and development.

These ILAs differ from traditional tuition assistance and reimbursement programs in which the employer pays, or reimburses an employee, for the expenses of education, in whole or in part. In an ILA program, the employee uses the account as he or she wishes for learning and education, within the parameters for which the account is established.

The Task Force also found that some Federal agencies already have ILA-like arrangements with employees. For example, in some agencies, a specific amount of money is set aside for training each individual employee. The funds pay, or reimburse the employee, in whole or in part, for training and education related to his or her official duties. The employee may, or may not, contribute personal time and money to this training.

B. Task Force recommendations.

The Task Force determined that ILAs might be a positive addition to an agency's toolbox of approaches to meet employee training needs and to support lifelong learning. It felt Federal agencies should experiment with using ILAs and recommended that agencies conduct pilots.

The Task Force also recommended that the U.S. Office of Personnel Management (OPM) manage the ILA pilot initiative, develop guidelines for implementation, analyze results of agency pilots and publish a report on lessons learned.

ESTABLISHING AGENCY PILOTS:

A. Definition of Federal individual learning accounts.

While all the ILA programs reviewed by the Task Force are funded in terms of dollars, the group concluded that limiting the definition of ILAs to dollar accounts would be too restrictive for Federal pilots. The Task Force agreed that for the Federal pilots, *an ILA is a base amount of resources expressed in terms of dollars or hours or both that are set aside for an individual employee to use for his or her learning and development.*

Accounts may be used to develop knowledge, skills, and abilities that directly relate to the employee's official duties. ILAs are not limited to programs delivered by learning technology.

B. Objectives of agency individual learning account pilots.

An ILA is a strategy or tool that complements current agency training activities. The objectives of agency ILA pilots include, but are not limited to:

- Improving organizational performance and meeting specific agency performance goals.
- Increasing employee access to and use of emerging learning technology.
- Supporting employee efforts to acquire skills and learning needed to succeed in specific occupations and professions.
- Providing employees with flexible learning opportunities, and putting the responsibility for learning in the hands of the learner.
- Improving Federal employee performance, increasing productivity, and improving customer service skills.
- Supporting employee lifelong learning.
- Determining the scope and practicality of ILAs.
- Identifying legal and regulatory constraints to effective implementation of ILAs.

C. Eligibility for individual learning accounts.

With the exception of Schedule C appointees and uniform personnel in the U.S. Department of Defense, an agency may establish ILA pilots that include any executive branch Federal employee, including career, career conditional, part time, temporary, or excepted service employee in professional, technical, clerical, administrative, or management positions.

D. Some suggestions and examples for individual learning account pilots.

Pilots may be instituted to meet general or specific agency needs. For example,

- Targeted pilots might establish accounts used to develop specific skills that employees need throughout the agency, i.e., technology skills or leadership skills.

- A special purpose pilot could establish accounts for employees in low skill, low paying jobs in order to build competencies and improve their competitiveness in the Federal labor pool.

- A pilot could establish learning accounts for the specific purpose of giving employees more access to learning technology, and to increase their use of it.

- A pilot could be limited to employees in a specific office or program area, i.e., the employees in the administrative support function in a division.

- Widespread, universal pilots could offer learning accounts to any agency employee.

Below are some possible examples of Federal ILAs. These examples are meant for illustrative purposes only.

- An agency could set aside a designated sum of money annually for education that meets learning needs identified in employees' competency-based individual development plans.

- An agency could give employees a designated amount of official time to dedicate to learning activities related to improving their performance, such as a specific number of hours each month.

- An agency could establish learning accounts that provide employee's time for Internet courses or developmental assignments, such as rotational assignments, intergovernmental assignments, details to other agencies, and individual learning assignments.

- An agency could use official time to provide employees time for increased access to subject matter experts and for coaching and mentoring.

- An agency could establish accounts for employees needing professional credentials, and cover some or all of the costs of job-related training to prepare for exams and also provide employees a designated amount of time to prepare for exams.

- An agency could also institute a development program that, in addition to orientation, collateral assignments, and development assignments, provides each participant a sum of money for academic education related to the program.

E. Issues that need resolution.

As agencies identify possible pilots, they should consider issues such as equity and union involvement in pilot development and implementation. They also need to track and be able to report to OPM any issues associated with the administration and funding of the pilots.

REPORTING ILA PILOTS TO OPM AND IMPLEMENTING PILOTS:

A. ILA pilot project designs.

Agency pilot plans should be submitted to OPM in order for OPM to track pilot numbers and types and prepare for assessment of this Governmentwide initiative. Agencies wishing to experiment with ILAs should submit their plans by January 14, 2000. Designs for agency pilots should include, but are not limited to

- Major purpose of the pilot, including results intended, performance objectives, and measures for success.
- A plan for collective bargaining unit involvement in pilot design and implementation.
- Scope of pilot, including participating agency program(s), numbers and kinds of employees covered, funds or time agency contributes, expectations about employee contributions, etc.
- Pilot administration, including how set-asides of dollars and official time will be handled, how equal access will be assured, how employee reaction will be assessed, etc.

Send plans of pilot projects to Director, U.S. Office of Personnel Management, Room 5305, 1900 E Street, NW, Washington, DC 20415.

B. ILA pilot implementation.

Agency pilot programs should begin no later than March 15, 2000.

However, in some cases, agencies may wish to initiate pilots after March 15. Additional pilots are encouraged, those agencies should submit plans as indicated above and submit preliminary evaluation results no later than six months after the launch date.

C. ILA pilot project evaluations.

Preliminary evaluations of agency pilots are due to OPM by September 30, 2000. Evaluations should include:

- A brief description of the pilot, its intended purpose, how the pilot was implemented, and the measures established to determine its success.
- An assessment of pilot results, that is, how well the pilot accomplished its intended purpose, met established performance measures, and contributed to a positive change in workforce performance.
- A description of numbers and types of employees covered; staff time dedicated to the pilot; number of employees who participated; types and kinds of learning activities pursued by employees; agency contributions in money and official time; and employees' contributions in money and personal time.
- A summary of employees' reactions to the pilot, including feedback from participating employees, managers and supervisors and others involved.
- A description of barriers encountered in implementing ILA pilots.
- Agency recommendations for further program, agency and Governmentwide actions.

TIMETABLES FOR INITIAL PILOTS AND THEIR EVALUATION

- Submit proposals to OPM by January 14, 2000.
- Begin pilot programs no later than March 15, 2000.
- Submit preliminary evaluations to OPM by September 30, 2000.
- Should an agency launch a pilot after March 15, 2000, it should submit preliminary evaluations no later than six months after the launch date.
- OPM will analyze pilots and issue guidance by March 2001.

D. OPM contact.

Questions about establishing and implementing ILA pilots should be directed to LaVeen Ponds at OPM's Office of Human Resource Development, 202-606-1394.

APPENDICES

1. SAMPLE FORMAT FOR REPORTING PILOT DESIGNS TO OPM.

Identifying information:

1. Agency name, address.

2. Point of contact's name, street address, phone number; fax number, and e-mail address.

Pilot description:

1. Major purpose of pilot - include results pilot intended to achieve and performance indicators for measuring success.

2. Plan for collective bargaining unit(s) involvement in design of pilot.

3. Scope of pilot - include agency program designation, employees to be covered, what amount of funds or time does the agency contribute, what amount of funds or time does the employee contribute, etc.

4. Administration of pilot - include how will set-asides of dollars and hours be handled, how equal access will be assured, how employee reaction will be assessed, etc.

2. EXISTING TITLE 5 FLEXIBILITIES AND ALLOWABLE TRAINING EXPENSES

EXISTING TITLE 5 TRAINING LAW FLEXIBILITIES.

Agencies may provide employees any training or education that improves their performance or the performance of the organization and assists in achieving the agency's mission and performance goals. [5 U.S.C. 4101]

Agencies may pay for education leading to an academic degree in order to improve organizational performance in areas of critical skills shortages. Merit system principles apply to selecting candidates for academic degree training. [5 U.S.C. 41079]

Agencies may share the costs of training and education with employees and may reimburse employees for all or part of the costs of successfully completed training and education. [5 U.S.C. 4109]

Agencies may procure and pay for training or education from the source that best meets their needs with no distinction made between Government and non-Government sources. [5 U.S.C. 4109]

Agencies can determine when continued service agreements are necessary to protect the Government's investment and may apply these agreements to Government or to non-Government training. [5 U.S.C. 4108]

TRAINING EXPENSES ALLOWABLE UNDER 5 U.S.C. 4109(A)(2).

- **Tuition and matriculation fees, including fees for online courses.**
- **Library and laboratory services, including fees for online services and databases.**
- **Purchase or rental of books, materials, and supplies, including computers, software, CD ROMS and electronic learning material, including adaptive equipment for persons with disabilities.**
- **Services or facilities directly related to training employees, including readers for the blind, tutoring, counseling directly related to enrollment in learning activities, and examinations to determine level of proficiency and level of training needed.**
- **Travel and expenses, including parking fees and costs for attending training that takes place outside the employee's duty station.**
- **Membership fees if the fee is a necessary cost directly related to the training itself or if payment of the fee is a condition precedent to admission to training.**

Appendix B. Agency Federal ILA pilot Initiative Coordinators

Ms. Anne Marie Acton
Director, Training and Organizational Development
General Services Administration

Ms. Sue Anstead
Acting Chief, Training and Development Division
Federal Highway Administration
Department of Transportation

Ms. Ledia E. Bernal
Director, Office of Financial and Administrative Services
Occupational Safety and Health Review Commission

Ms. Beverly Brebnor
Employee Development Specialist
Department of Commerce

Mr. Ed Brilliant
Human Resource Project Manager
Internal Revenue Service
Department of Treasury

Ms. Beverly Compton
Training Officer
Indian Health Service
Department of Health and Human Services

Ms. Kim Green
Director, Continuous Learning and Career Management Center
Department of Labor

Mr. Paul Harrison
Employee Development Specialist
Social Security Administration

Dr. Sande Lehrer
Branch Chief, Performance and Career Development
Office of Personnel Management

Mr. Jeff McArthur
Deputy Director of Departmental Training Support Division
Department of Housing and Urban Development

Mr. Bill Swigert
Chief, Civilian Education and Training Branch
Department of Defense

Mr. Kerry Weiss
Director, Institute for Individual and Organizational Excellence
Environmental Protection Agency

Appendix C. Synopses of Agencies' Federal ILA Pilots

DEPARTMENT OF COMMERCE

This pilot is consistent with the SES 2000 goals to establish a strong, departmentally managed executive development program that includes executive development plans, formal education, training and mobility. The purpose of the ILA is to ensure that our SES workforce gives priority to participation in development activities annually. Cost for training will be borne by each bureau. Executives are encouraged to attain the 24-hour training goal.

DEPARTMENT OF DEFENSE

DOD's Air Combat Command (ACC) funds 75 percent of the tuition costs for participating civilian employees. ACC guarantees a consistent level of financial support for employee directed self-improvement efforts that enhance organization and individual performance and results in improved mission readiness. Approximately 9,000 permanent civilian appropriated fund employees are covered. Eligible employees are both General Schedule and Wage Grade. ACC set aside resources to fund 75 percent of the tuition costs for selected series. Employees electing to participate fund 25 percent of the costs. Estimated funding for Fiscal Year 2000 is $400,000. Participation in the program is on a first-come, first-served basis.

DEPARTMENT OF HEALTH AND HUMAN SERVICES
INDIAN HEALTH SERVICE

The Indian Health Service headquarters (IHS/HQE) administrative staff increases Internet awareness and improves skill levels through the use of accounts of duty hours and funds that are set aside. The IHS/HQE contributed a portion of the average training dollar spent on each employee in fiscal year 1999 and set aside a total of up to eight hours a month of official duty time for each ILA. Approximately 35 employees from grade GS-4 to GS-13 in the IHS/HQE administrative staff are eligible to participate in this pilot. The ILAs promote increased use of Internet-based tools and resources and can increase workplace effectiveness.

DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Department of Housing and Urban Development (HUD) set aside up to $200,000 annually for Upward Mobility Program participants to use for their continuous learning and development. Approximately 200 employee trainees participate in the HUD Upward Mobility Program. Once these trainees reach their targeted position, they still require additional training to reach their maximum potential grade level. The ILA is used as a continuous resource to provide these employees the opportunity to gain the knowledge, skills, and abilities to be successful. The ILA pilot encourages employees to develop technology and/or leadership skills necessary to acquire core competencies for maximum career potential. Employees who are at their target level may participate in the ILA pilot.

DEPARTMENT OF LABOR

Department of Labor's (DOL) ILA is intended to encourage employees to participate in lifelong learning activities and take charge of their learning and development. Seventy employees in the Office of the Assistant Secretary for Administration and Management in DOL's Boston/New York Region are granted 20 official duty hours to pursue lifelong learning activities. The ILA of official time set aside encourages and empowers employees to take advantage of learning opportunities. The job-related, no cost learning activities include:

- online, web-based technical and non-technical courses;
- self study courses covering human resources practices and procedures;
- use of educational programs on audio or video cassette;
- professional career counseling; and
- college advisory services.

Employees develop performance learning goals that can be achieved using these learning activities. They may access many of these learning activities without leaving their workstations. The ILA pilot supports DOL's effort to establish itself as a Lifelong Learning Organization.

DEPARTMENT OF TRANSPORTATION
FEDERAL HIGHWAY ADMINISTRATION

Three Federal Highway Administration organization units set aside ILA funds for approximately 30 employees for participation in the ILA pilot. Office of Professional Development (OPD) has a staff of 17 employees of various grade levels, education, and skills. OPD set aside $800 for each employee. Each OPD employee determines how to use their ILA and adds it to their performance objectives.

The Western Resource Center (WRC) in San Francisco, California has seven employees. WRC allocated $2500 for each participant's ILA. As WRC ILA participants create or update their Individual Development Plans (IDPs), they identify specific training objectives for their ILAs.

The Illinois Division in Springfield set aside five ILAs for the members of the Engineering Technology Team totaling $4000. Skill level and training needs of each team member will determine the distribution of the ILA.

The variety of organizational units and employees involved in the ILA pilots provides a broad base for evaluating the practicality and feasibility of using ILAs as an effective means of expanding learning and development opportunities for Federal employees.

DEPARTMENT OF TREASURY

INFORMATION SYSTEMS PROJECT ILA

Internal Revenue Service Information Systems (IS) employees participate in a career development program improving organizational and individual performance. Internal Revenue Service (IRS) allocated up to $300,000 through the Information Technology Institute Fund (ITIF) to support the ILA Pilot. The pilot provides IS associates the opportunity to enhance their current knowledge and skill level to support their career development. Participants can acquire mission-related competencies through after hour's undergraduate or graduate level college courses needed to compete for positions requiring additional knowledge. The Director of the School of Information Technology will have overall management responsibility for the program. The Field Information Technology Institute in Cincinnati will administer the program within the Chief Information Office. Maximum amount of funds available for each employee will be based on the number of employees participating in the pilot.

ACCOUNTING COMPETENCIES ILA

Eligible IRS employees participate in Accounting Competencies ILA Program providing the opportunity to acquire the accounting competencies needed to compete for positions requiring additional accounting knowledge. The ILA applied to IRS employees who completed basic or entry-level accounting. Each participant has an opportunity to enhance their current knowledge and skill level to support career growth and development. IRS initially recommended $600,000 set.aside for the pilot. Maximum allotment available for each participant is based on the total amount of funding and number of employees selected.

CAREER GROWTH AND DEVELOPMENT PROGRAM

IRS sets aside $700,000 for their employees Career Growth Program to enhance individual career growth and development. This pilot enhances individual career growth and development that supports the overall mission of the IRS. IRS will allocate funds for selected participants. The Agency initially recommended $700,000 set aside for the pilot. Maximum allotment available for each participant will be based on the total amount of funding and number of employees selected.

ENVIRONMENTAL PROTECTION AGENCY

Approximately 35-50 Environmental Protection Agency (EPA) employees participate in a pilot developmental program, "New Skills/New Options", with set asides of $2000 for each participating employees' use. These EPA employees are in the administrative support classification series and are eligible for participation in the pilot project. The pilot focuses on scientific and technical offices within the EPA at the headquarters, regional, and laboratory levels. EPA set aside official time for classroom or other special training along with $2000 per participant to purchase learning opportunities. The ILA pilot is designed to increase support staff skills and developmental options. When fully implemented, New Skills/New Options will provide developmental guidance to a total administrative population of nearly 2,000 employees. It is one of five developmental initiatives under EPA's comprehensive Workforce Development Strategy.

GENERAL SERVICES ADMINISTRATION

OnLine University ILA

General Service Administration (GSA) established an agencywide learning account through its OnLine University virtual campus by setting aside $140,000 for courses for all employees. The GSA OnLine University is a portal where employees enter a virtual campus that gives access to a broad range of courses. This broad range of courses and ready accessibility increases learning through technology. The learning account provides the opportunity for employees to increase skills and competencies. All agency employees have access to the GSA OnLine University and may take any offered course online anytime, anywhere.

Federal Supply Service ILA

GSA also provided an ILA set aside funding for Federal Supply Service (FSS) GS-1102 Workforce to meet new job qualifications. FSS set aside funding for each ILA participant to take two mandatory training courses to meet new job qualifications. Employees in the GS-1102 job series are better able to meet the new qualification standards using the ILA funding. FSS organizations, working with their GS-1102 employees, determine the employee's interest in participating in the project. They provide information on formal education, training programs, and job experience that can be developed into an annual Personal Career Plan for the participants.

OCCUPATIONAL SAFETY AND HEALTH REVIEW COMMISSION

Occupational Safety and Health Review Commission (OSHRC) set aside 40 official duty hours to increase employees access to and use of emerging learning technologies. The pilot covers all OSHRC employees. Each has a 40-hour set aside which may be used for the following development areas:

- programmatic, technical, and professional development for attorneys and administrative law judges;
- leadership skills;
- technology skills for administrative employees;
- fiscal, administrative, personnel, and public information;
- team-based training for ad-hoc teams;
- special purpose competency-based training for eligible employees; and
- general training of employees in communication and office automation.

Supervisors worked with each eligible employee to establish training activities for their ILA. The pilot supports the agency's commitment to identify and fulfill annual and long-term training needs.

OFFICE OF PERSONNEL MANAGEMENT (OPM)

OPM's Retirement and Insurance Service (RIS) is expanding its efforts to enhance employees' skills needed for success under the Retirement Systems Modernization Program. All 107 employees in RIS's Retirement Claims Division (RCD) are participating in this pilot. As part of the modernization program, an RCD Future Skills Committee identified six skills necessary for successful performance over the next decade. The ILA pilot introduces the participants to the concepts of self-directed and life-long learning, provides an ILA for each employee, and provides them access to mentors and other forms of assistance to encourage self-development in six skill areas. This ILA effort not only encourages self-development in these six skill areas, but also expands on-going efforts to focus employees' energies on acquiring new skills necessary for success under the Retirement Systems Modernization Program.

SOCIAL SECURITY ADMINISTRATION (SSA)

SSA ILA set aside duty hours to improve employees' core competency skills using an internally developed self-assessment tool and available training resources. Employees used a self-assessment tool to determine their current level of proficiency. Duty hours are set aside allowing participants to take training needed to improve the competencies as identified by the tool. The pilot covers employees in the Denver Region and a headquarters component in Baltimore, Maryland, representing approximately two percent of the total workforce.

Appendix D. Synopses of Agencies Federal ILA Pilots Results

AGENCY AND COMPONENT	GOAL/RESULT
Department of Commerce	**Goal:** Ensure SES workforce gives priority to participation in development activities annually. **Results:** Data to be submitted at a later date.
Department of Defense Air Force Air Combat Command (ACC)	**Goal:** To improve performance and promote mission readiness. **Results:** Commander/supervisor survey results confirmed that the ILA program enhanced individual performance and improved mission readiness. Eighty-eight percent of commanders/supervisor respondents indicated that participating employees showed improved job performance. A hundred percent of commander/supervisor respondents indicated that morale and quality of life for participating employees was improved. Seventy-three percent of employee respondents said they would not have been able to achieve their professional goals without the ILA. Total of 484 employees from a variety of fields participated. A total of $238,535 was expended. ACC recommended that pilot be fully funded and implemented AF wide to enhance readiness and contribute to continuing quality of life efforts for employees.

AGENCY AND COMPONENT	GOAL/RESULT
Department of Health & Human Services Indian Health Service	**Goal:** Build Internet skills among administrative support staff. **Results:** Six staff members expressed interest in the ILAs project and two have taken courses. The program has been extended into FY 2002 and two additional courses will be added for the participants. The pilot contributed to raised awareness among the targeted population of expanded Internet skills needed by the organization and encouraged some managers to recommend training for the targeted population overlooked in the past.
Department of Housing and Urban Development (Upward Mobility Program ILA)	**Goal:** Enhance the Department's Upward Mobility Program by providing resources to a target audience for continuous learning and development. **Results:** The pilot project was viewed as a success. The participants in the program gained additional training and developmental opportunities because of the available funding through ILAs. The training completed by each participant was program specific and was selected based on trainees' needs to acquire skills and knowledge in their specific career area. Twenty-three participants used their ILA resources expending approximately $20,000.

AGENCY AND COMPONENT	GOAL/RESULT
Department of Labor (Boston/New York Offices of the Assistant Secretary for Administration and Management-OASAM)	**Goal:** Encourage employees to participate in lifelong learning activities and take charge of their learning and development. **Results:** Fifty employees out of seventy eligible employees participated in the ILA project. By the end of the pilot 34% had taken training. Most participants were generally enthusiastic about the program because it presented them a good opportunity to learn something new and develop their skills. Supervisors believed ILAs encouraged participants to take training and showed that the Department is interested in employees' training and development.
Department of Transportation 3 components of Federal Highway Administration (FHA)	**Goal:** Determining the practicality and feasibility of ILA use in FHA. **Results:** Participants generally saw ILAs as an opportunity to assume greater responsibility for their professional development, to tailor learning and development activities to their individual needs, and to obtain needed training on a more timely basis. Most agreed that there is potential for ILAs to have a positive impact on employee growth and development in the long run.

AGENCY AND COMPONENT	GOAL/RESULT
Department of Treasury Internal Revenue Service Information Systems (IS) Investment Fund	**Goal:** Meet the IS organizational need of developing project management certificate program. *[See Career Growth Program ILA results below.]*
Department of Treasury Internal Revenue Service Accounting Competencies Program	**Goal:** Increase the number of certified public accountants (CPAs) in the Western Region in order to meet the IRS' goal of developing a talented, highly skilled workforce equipped to provide exceptional service to taxpayers. *[See Career Growth Program ILA results below.]*
Department of Treasury Internal Revenue Service Career Growth Program	**Goal:** Enhance individual career growth and development that supports the overall mission of the IRS. **Results:** The IRS pilots went well. Approximately 1500 of 2000 eligible employees participated. Most participants just finished their initial courses at the end of 2000. The agency plans to do surveys, interviews or focus groups in spring 2001 to further assess the program. However, the ILA programs continues to grow in funds allocated, employees participating, and the development of highly strategic and innovative programs. The agency stated that "the potential return on investment in terms of employee career development, retention of highly qualified employees, a more competent workforce and employee satisfaction is well worth the cost of the program."

AGENCY AND COMPONENT	GOAL/RESULT
Environmental Protection Agency	**Goal:** Identify the emerging learning needs of support staff for purposes of revitalizing this occupational area to enhance organizational effectiveness, managerial effectiveness, and employee satisfaction. **Status:** Implementation began in Fall 2000. Results not yet available.
General Services Administration (Online University ILA)	**Goal:** Give employees more control and input into their training and provide them with individual accounts to take training online. (OLU) **Results:** OLU is being used as a major training vehicle to reduce the cost of travel associated with training. The ILA met established performance measures as evidenced by surveys showing savings from employees taking on line courses vs. traveling and using higher priced commercial courses was significant. Overall, the employees were very excited about having Online University (OLU) as a training resource. They were particularly impressed by both the quality of the individual courses and the quantity of courses available in a wide variety of subjects. They also enjoyed the convenience and flexibility of online education, with the ability to work at one's own pace being the biggest draw to taking future online courses. Managers commented, "The online university is great because it assists my employees with continuing development and encourages educational growth. The cost savings makes it even better!"

AGENCY AND COMPONENT	GOAL/RESULT
General Services Administration (Federal Supply Service,(FSS) ILA)	**Goal:** To assist participants to meet the new educational requirements of the FSS position and increase the number of employees meeting qualification requirements for these acquisition positions. **Results:** The program has been very successful and is funded through 2003. Additional data will be submitted later.
Occupational Safety and Health Review Commission	**Goals:** Improve employee performance. Meet specific agency performance goals. Support employee career-long goals. Support employee efforts to acquire skills and knowledge needed to succeed in specific occupations and professions. Employee attainment of at least 40 hrs of training. Increasing employees access to and use of emerging learning technologies. **Results:** The ILA covered all eligible employees in the agency. Of these, fifty-two received a minimum of forty hours of training. Questionnaires were used to assess employees', managers' and supervisors' perspective of the pilot. All managers/supervisors reported that they noticed an improvement in their employees' performance as a result of taking courses based on their ILAs. Three felt that the courses contributed greatly. One supervisor responded that "ILA provided mechanism for me to make sure appropriate training was provided." The majority of employees reported that the courses contributed somewhat or greatly to enhancing or improving job performance.

AGENCY AND COMPONENT	GOAL/RESULT
Office of Personnel Management (Retirement Claims Division)	**Goals:** Encourage employees to become more involved in their own learning and development. Provide flexible learning opportunities for employees. Better prepare employees to successfully acquire necessary skills to meet present and future performance challenges. **Results:** Overall, the ILA pilot program has been successful. A significant number of participants thought the courses they attended were very valuable to their effectiveness at work. One hundred percent of those who started an ILA-funded course completed it. The three main objectives were definitely met. Eighty-four participants out of one hundred and four eligible, completed a Plan of Action to reserve their ILA. Sixty-two participants attended one hundred and thirty three learning opportunities. Sixty-six percent of the learning opportunities were taken during official time. Thirty-four percent of the learning opportunities were taken during non-official time. Ninety-six percent of participants thought the program should continue.
Social Security Administration Divisional Headquarter component and a Region	**Goal:** Promote employee core competencies through use of self assessment tool with links to on-line training that can be taken to strengthen areas identified as weak **Status:** Implementation began in August 2001 and will run through February 2001 for the regional component and for a year in Denver. Results will be reported after March 2001.

* Results are excerpted from individual agency evaluation reports.